



CITY OF LODI

COUNCIL COMMUNICATION

AGENDA TITLE: Purchase of Automated Records Management Program for the City Clerk's Office

MEETING DATE: December 3, 1997

PREPARED BY: City Clerk and Management Information Systems Manager

RECOMMENDED ACTION: That the City Council adopt resolution authorizing the purchase of an automated records management program, **File Magic Plus**, for the City Clerk's office from Appleby & Company, Inc., of Fresno, California, in the amount of \$19,838.

BACKGROUND INFORMATION: The legislative indexing system presently being used by the City Clerk's office was originated many years ago. As the City has grown the need for a more easily-accessed, user-friendly and sophisticated system has become very evident. The present system is cumbersome and outdated and needs to be updated in order to provide easy access to all departments of the City needing this information. In addition, the City Clerk's office needs to be able to respond in an efficient and professional manner to the myriad of inquiries received from the press and citizens at large.

The City Clerk is mandated by State statute to have a legislative indexing system in place.

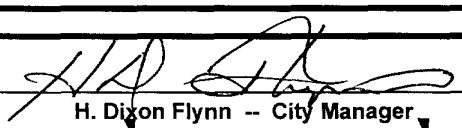
During the past several months the City Clerk and the Management Information Systems Manager have been involved in seeking out systems that would best serve this function for the City Clerk's office. Because the requirements of such a system are unique, our search revealed very limited product availability.

The search for the most appropriate product included:

1. A State-wide telephone survey of cities with populations between 50,000 to 100,000 regarding the product(s) currently being used.
2. Review of product brochures.
3. VCR and CD demonstrations.
4. In-house demonstrations

Following an in-depth study of the information made available to us, the Management Information Systems Manager, and the City Clerk and her staff all agree that **File Magic Plus** best fits the needs of the City Clerk's office for the reasons outlined on the next page:

APPROVED: _____


H. Dixon Flynn -- City Manager

- **File Magic Plus** is a Windows-based document management software program that captures any document, color or black and white, image or text from any source and stores it in your computer system.
- **File Magic Plus** documents are captured in one of three ways.
 1. Scanned - from paper originals
 2. Imported - through electronic capture of documents
 3. Faxed directed - by being imported electronically
- **File Magic Plus** filed documents are immediately available for review and use. Documents can be retrieved with a wide variety of search options: browse, search narrowing, fixed queries or variable queries, full text queries, fuzzy search, highlight of hits or any combination of the above.
- One can output and share a document from **File Magic Plus** almost any way you want: print it or fax it, send it by E-mail, etc.

We have been in contact with Appleby & Company, Inc. which is a company that has been in business for 40 years and has for several years been a leader in digital imaging and Electronic Document Management Systems (EDMS). As an EDMS service bureau, Appleby & Company, Inc., provides backfile conversion, system design and implementation consulting, document shredding, and is a reseller of several leading EDMS software packages.

We are convinced that **File Magic Plus** excels in providing unique, user-friendly capabilities not available in this price range with other products, and that it would best serve the needs of this office. This product is compatible with computer equipment presently in our office and it would appear that we can utilize the existing File Server.

Because of the uniqueness of our particular needs and the capabilities of this particular product, the City Attorney has indicated that he feels the **File Magic Plus** proposal meets the sole source provisions of the State statute.

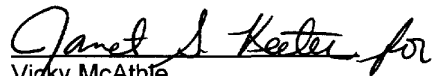
File Magic Plus would allow the City Clerk's office an efficient and time savings input system, easy access, and a "read only" feature for all other users on the system.


Funds have been budgeted in the Capital Budget for this purchase.

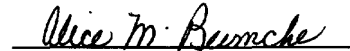
For all of the reasons outlined above, it is our recommendation that the City Council approve the purchase of this equipment.

FUNDING: Capital Budget: \$19,838.00

Funding Approved:


Vicky McAthie
Finance Director


Stan Helmle
Management Information
Systems Manager


Alice M. Reimche
City Clerk



Imaging & Electronic Document Management

• Backfile Conversion • Systems Design & Consulting
• Electronic Document & Records Management Software
Reseller: • *LaserFiche*® • *DocuWare*® • *FileMagic*® • *Fortis*® • *Summation*®

2828 N. Wishon Fresno, CA 93704 209-222-8402 FAX 222-5043 Web: applebyco.com Email: toconnor@applebyco.com

November 19, 1997

Stan Helmle
City of Lodi
221 West Pine
Lodi, CA 95241

Dear Stan:

This letter covers four issues: 1) Sole source availability of affordable digital imaging / electronic document management software packages, 2) Computer file storage requirements, 3) Year 2000 compliance, and 4) References.

1) As a VAR (value-added reseller) of imaging and electronic document management software packages, we are in a constant product evaluation mode. In addition, we are active members of AIIM, (Association for Information and Image Management). AIIM is comprised of the major players in the document management industry serving thousands of government, corporate and individual members. In short, we believe we have a handle on the information management software marketplace.

In our opinion there is only one moderately priced product that manages multiple file formats. That product is FileMagic Plus. Most other products manage only digital images. The others that do handle many file types are high-end, enterprise-wide, work-flow systems priced several times higher than FileMagic.

The closest competitor to FileMagic is LaserFiche, for which we are also a reseller. LaserFiche manages only digital images, whereas FileMagic manages images and hundreds of the most common file formats (word processing, spreadsheets, CAD, etc.) Moreover the FileMagic product has built-in functions that LaserFiche charges extra for. These functions are substantive, for example Zone OCR (auto-indexing), Email and a tiff maker. Moreover, function-to-function the FileMagic Plus product, for a five-user license, is half the price of LaserFiche.

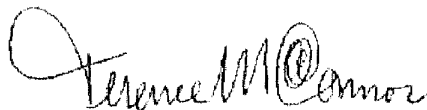
2) The average digital image per page file is about 40/k. 100,000 documents will occupy 4 GBs. The average nonimage file, (e.g., .doc, .txt, etc.) is only about 2/k.

3) FileMagic Plus is year 2000 compliant, requiring no action on anyone's part.

4) References attached

Please call with any other questions.

Sincerely,

A handwritten signature in black ink, reading "Terence M. O'Connor". The signature is fluid and cursive, with the first letter of each word being capitalized and prominent.

Terence M. O'Connor
Vice President - Marketing

F11u

RESOLUTION NO. 97-196

A RESOLUTION OF THE LODI CITY COUNCIL APPROVING THE
SOLE SOURCE PURCHASE OF AUTOMATED RECORDS
MANAGEMENT PROGRAM FOR THE CITY CLERK'S OFFICE

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WHEREAS, Lodi Municipal Code, §3.20.070, authorizes dispensing with bids for purchases of supplies, services or equipment when it is in the best interests of the City to do so; and

WHEREAS, the City Clerk is mandated by State statute to have a legislative indexing system in place; and

WHEREAS, the legislative indexing system presently used by the City Clerk's Office is outdated and cumbersome; and

WHEREAS, several avenues have been investigated to ascertain what type of system would best serve the City of Lodi, i.e. state-wide telephone survey of cities with populations between 50,000 to 100,000 regarding products currently being used, review of product brochures, VCR and CD demonstrations, and in-house demonstrations; and

WHEREAS, it has been determined by staff that "File Magic Plus" best fits the needs of the City in order to update and modernize the recordkeeping procedures that are the responsibility of the City Clerk's Office, and enabling information to become more accessible to staff, the public via e-mail, fax, computer, etc.

NOW, THEREFORE, BE IT RESOLVED, that the Lodi City Council hereby approves the sole source purchase of the "File Magic Plus" automated records management system in the amount of \$19,838.00; and

Dated: December 3, 1997

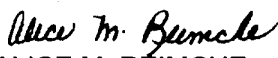
I hereby certify that Resolution No. 97-196 was passed and adopted by the City Council of the City of Lodi in a regular meeting held December 3, 1997, by the following vote:

AYES: COUNCIL MEMBERS – Land, Mann, Sieglock, Warner and
Pennino (Mayor)

NOES: COUNCIL MEMBERS - None

ABSENT: COUNCIL MEMBERS - None

ABSTAIN: COUNCIL MEMBERS - None


ALICE M. REIMCHE
City Clerk